Conference Merger Checklist

Purpose
This document is intended for new Conference officers and appointed transition coordinators to serve as a guide to Vincentians whose Conferences are merging to avoid confusion, conflict, and wasted time. Achievement of the phased approach described below will result in a strong, flourishing Conference that fully lives its Vincentian vocation through deep spirituality and adherence to the Rule and Manual.

According to our Rule, decisions are made by consensus after the necessary prayer, reflection, and consultation. The democratic spirit is fundamental at all levels of the Society and, when appropriate, matters are put to a vote. Plan for an initial meeting with your District President and your assigned Council Office representative.

Overview of Phases

Phase I - Merger Initiation (approximate duration: 1 month)
Phase I is intended to rapidly establish the basics of a new Conference by electing a new President, assigning officers, implementing “Group A” Minimum Requirements, and maintaining Neighbor service for all merging Conferences. The new Conference officers, along with appointed transition coordinators (consider appointing a temporary “VP of Transition”), will facilitate the transition of merging all Conferences into one consolidated Conference.

Phase II – Operations Consolidation (approximate duration: 3 months)
Phase II establishes a fully functional, consolidated Conference, including assigned roles and responsibilities, 2 full meetings a month, all necessary Neighbor service operations, timely record keeping, compliant treasury practices, and continued work on “Group B” Minimum Requirements.

Phase III – Closure Completion (approximate duration: 3 months)
Phase III completes remaining Conference closure activities, including transfer of assets, records, and property. All Minimum Requirements (Group A and B) are implemented or in the final stages (Conference Aggregation).

Phase IV – Transformational Renewal (approximate duration: 6 months)
Phases IV builds on the solid foundation that has been established. The Conference earnestly strives to enrich spiritual life and friendships, recruit new members, and build a larger, sustainable funding stream from the newly merged parish community.

Phase V – Best Practice Implementation (approximate duration: 6 months)
With a robust and flourishing Conference in place, members pray and use their creativity to envision and implement best practices and new works as true Servant Leaders.
Phase I - Merger Initiation (approximate duration: 1 month)
The parish merger is announced by the Archdiocese. Please contact the Council Office if it is announced that your parish is merging. If you haven’t already become friends with your merging Conference(s), cordially meet soon and become Vincentian Friends. Communal prayer of merging Conferences, asking the Holy Spirit for wisdom, guidance, and exercising our 5 Vincentian virtues, should be a very high priority. Now is the time to strengthen relationships and retain all Vincentians who will be invaluable in the New Conference.

PLEASE NOTE: Conference merger timing should be synchronized with the parish merger timeline, specifically coinciding with parish financial consolidation. Until the new Conference leaders and members develop a plan, and everything is in place to operate as one unified Conference, current Conference operations should continue, as is, to ensure that Neighbors’ needs are met. If possible, Conference merger activities should begin approximately 4 months before the parishes consolidate finances.

☐ Council Representative and District President meet with current Conference Presidents (and/or designees) to deliver merger binder and other resources, and to discuss potential plans and next steps.

Governance - Elections

☐ Approximately 4 months before parish finance consolidation, elect a Conference President for the merged Conference by forming an election committee, taking nominations, and distributing biographies. Allow 4 weeks for election preparation. Hold elections for the new Conference President according to National’s “Election Process for a Conference.”

☐ The newly elected President assigns officers for the new Conference: Vice President, Secretary, Treasurer, and Spiritual Advisor. The new President should also assign a Transition Coordinator (consider appointing a Vice President of Transition) for each merging Conference. (Example: Three Conferences merging into one should have two Transition Coordinators for those Conferences that are being dissolved.) The Secretary and Treasurer for each closing Conference should remain active, as separate operations continue, until the consolidation is complete.

☐ New Conference should implement “Group A” Minimum Requirements (see StL version of Standards of Excellence Questionnaire) shortly after election of new Conference President and assignment of Officers during the first few meetings of the new Conference.

☐ Newly Elected President & Vice President meet w/ Pastor to discuss Conference personnel, structure, Neighbor coverage in the new territory, methods, and timing for fundraising (poor box, parish collections, donations, SVDP Sunday etc.), and other necessary matters. If the pastor is new, strive to cultivate and maintain a strong relationship with him. Remember, your conference is an integral part of the parish, providing valuable service to both the parish and community at large. It’s vitally important to have the pastor be an advocate and champion for your conference!

Communications
- Newly elected Conference President updates District President and Council representative of new officers and key accomplishments.

**Phase II – Operations Consolidation (approximate duration: 3 months)**

Vincentians, meetings, and operations are consolidated. Conference becomes fully functional in serving Neighbors. Conference works on implementing “Group B” Minimum Requirements. The merging Conference(s) should coordinate an operational “cut-over” date that coincides with the parish merger schedule – it should be close to the date of financial consolidation of parish finances.

**Basic Conference Setup**

- Approximately 3 months before parish finance consolidation, initiate Conference meetings with all Vincentians from merging Conferences.
  - Include prayer and personal reflection at all meetings (see “The Conference Meeting Agenda”)
  - Consider days, times, and locations convenient for the majority. Also, consider times that may be convenient for recruiting new members (including working adults).
- Provide all Vincentians with a copy of the Member Handbook and Pocket Rule.

**Serving Your Neighbors in Need**

- Start implementation of “Group B” Minimum Requirements for Conferences.
- Establish guidelines for helping Neighbors based on the input of all merging Conferences and Vincentians. (See Sample SVdP Conference Assistance Guidelines).
- Establish a schedule for Call-Takers and a list of Home Visit teams. Consider assigning a Captain for Call-Takers and a Captain for Home Visit Teams.
  - Develop a process for returning calls and assigning Home Visit Teams.
  - Consider new or different pairings of Home Visitors to encourage new friendships among Vincentians.
- Determine who will enter new Neighbor records and other data into ServWare.
- Develop a plan to cover the larger boundaries of the Conference. This may seem challenging but remember that your new Conference has Vincentians that have already been covering the territory for a while! Consider creating mixed teams with members from different Conferences so all Vincentians will learn about all parts of the larger territory. Consider new creative ways to serve your Neighbors.
- Order thrift store and food vouchers (if needed) by emailing programs@svdpstl.org. Please indicate the quantity needed and where you would like them sent.
- Discuss any Special Works that are currently in place at merging Conferences. Will they continue to operate in the consolidated Conference? Should they be expanded? Will any food pantry locations remain the same or change? Assign a Vincentian to oversee the pantry and recruit others to help as needed.

**Finance**

- All Conference financial activities and practices must be in accord with National’s “Conference Treasurer’s Manual.”
- Create a new bank account or utilize an existing Conference bank account for the new Conference.
☐ Change signatories on bank account(s) to reflect new officers. It is recommended that there be two signatures on all checks, however, this is a Council/Conference decision.

☐ Establish a policy to request/deliver checks.

**Phone Line & Email Address**

☐ When you are ready to serve your Neighbors through your newly merged Conference, change the phone message system. We recommend changing the message on closing Conference lines to direct neighbors to the new Conference phone line for assistance. If the new Conference is not already using the Council assistance line system, we recommend doing so. Contact Steve Rupp at Stever@svdpstl.org to help with this. The Council will keep the phone numbers for dissolved Conferences operating for approximately 180 days to help our Neighbors find the correct Conference.

☐ Set up a Conference email account if you don’t already have one. Conference email accounts are extremely helpful for avoiding phone-tag with Neighbors and receiving Conference business emails. If needed, contact the Council Office for help with email set up.

☐ Some Conferences may be interested in Google Workspace accounts for Vincentians.

**ServWare**

☐ Create a ServWare Merger Taskforce
  - Taskforce should consist of Conference ServWare Administrators, Conference Vincentian(s) most familiar with ServWare, Conference Treasurer (if ServWare is used for financials), a district SW Liaison and Council SW Lead.

☐ Neighbor and Request Data Cleanup (Use new purge feature to remove older records)
  - Case records older than three years should be removed per record retention policy.
    - (Contact District SW Liaison or John Doyle with questions/concerns)
  - Complete all Neighbor requests.

☐ Review Conference Member Roster (Check for accuracy – demographics, contact info, roles, etc.)

☐ Conference File Cleanup
  - Download significant files
  - Delete unnecessary files

☐ Meet with new Conference’s ServWare Merger Task force to discuss:
  - Configuration Options
  - Merger Roles and Responsibilities
  - New/revised Conference Procedures

☐ Contact John Doyle at Johnd@svdpstl.org to:
  - Review final steps before merging data
  - Merge ServWare records into new conference account
  - Schedule ServWare training for new Vincentians or as a refresher of best practices.

**Communications**

☐ Share new Conference information with parish organizations and parishioners when appropriate. Place new details (new officers, meeting times/place, phone number, email, details about joining, spirituality, donations etc.) in Sunday bulletins for a series of weeks.
Other Opportunities to Strengthen Your Conference

☐ Ensure all Vincentians know they are vitally needed and utilize their gifts and talents.
☐ Seek volunteers for important assignments within the Conference. (see Delegating Responsibilities and Potential Conference Activities). Opportunities include call takers, home visitors, ServWare administrators, special works (food pantry, Pregnancy Care Partnership, etc.).
☐ Beyond new officers, merging Conferences will be blessed with Vincentians with previous leadership experience. Consider experienced Vincentians new functions that would benefit the Conference. Examples include Recruiting Chair, Fundraising Chair, Communication Chair (bulletin posts, thank-you’s etc.), and ask for volunteers.
☐ Discuss other ministries or special works that could be started. Consider visiting shut-ins, transporting people to Mass, etc. (see Potential Conference Activities).
☐ Discuss Conference twinning. Consider twinning both Vincentians and funds with other Conferences or seek twinning from others if needed.

Phase III – Closure Completion (approximate duration: 3 months)
Completion of Conference closure activities - (see Dissolution of Conferences). All Minimum Requirements (Group A and B) are implemented or in final stages (Conference Aggregation).

The Transition Coordinator for the Closing Conference(s) will ensure that:
☐ Closing dates for closing Conference(s) are chosen – all closure activity should be complete before closing date.
☐ All outstanding bills have been paid.
☐ All vendor and utility accounts (if any) have been satisfied and closed.
☐ All remaining accounts are closed, and assets are transferred to the new Conference including:
  o All financial account(s) (including checking, savings, CDs, investments, etc.)
  o All records - Secretary’s, Treasurer’s, and those of all officers and committees
  o All physical assets, including Conference owned property.
☐ The data retention schedule provided in the Manual (pages 31 – 32) is followed.
☐ A final Council Activity Report (CAR) of closing Conference(s) is prepared and submitted.
☐ A notice of dissolution is sent to all necessary parties as listed in “Dissolution of Conferences”.
  See “Dissolution of Conferences” document for complete list of required activities.

The loss of a Conference can be upsetting to Vincentians, parishioners, and the entire community. Consider a:
☐ Conference Closure Commemoration along with a Mass. (see Conference Closure Commemoration)

Phase IV – Transformational Renewal (approximate duration: 6 months)
While the St. Louis Council will lose Conferences due to parish mergers, we will still have the same number of Neighbors to serve. We will need strong Conferences to serve our Neighbors in larger pastorates. Each of our Conferences should assess its capabilities, capacity, and collaborative activities. All Conferences should strive to become spiritually vibrant, nourishing the full flourishing of each Vincentian, and operationally strong (members, finances etc.).
Self-Assessment
- Now that the Conference is fully consolidated, and all Minimum Requirements are met, it’s time to increase Conference vitality and nurture the full flourishing of Conference life and each Vincentian. A good place to start for Presidents and Spiritual Advisors is a visit with Council staff for a President orientation and a Spiritual Advisor orientation. Next, with all Conference members, set aside a special time to thoroughly evaluate, and develop responses to, the “Growth-Revitalization Self-Assessment Questionnaire.” This is a good starting point to assess your Conference’s strengths and opportunities and start planning a fulfilling future serving your Neighbors.

Spirituality
- We have Three Essential Elements that are all very important. Since growth in holiness is the primary purpose of the Society, spirituality forms the foundation and the wellspring of Conference health and vitality.
- Conferences experience problems and decline most often when they neglect individual and collective spiritual nourishment and growth.

Friendship
- Develop a plan of activities for the coming year where Vincentians will spend time together increasing in holiness and deepening friendships.
- We should not overlook the spiritual blessings that ordinary activities offer (Conference meetings, returning phone calls, home visits, etc.) for being the face of Christ and spiritual growth.
- It’s important for Conferences to encourage relaxing and enjoyable fellowship. For example, snacks, beverages, and conviviality after meetings, planning and attending Vincentian feast day Masses, Conference days of recollection, field trips to shrines, special service projects, going out for breakfast, lunch, dinner, or a picnic, etc.

Recruiting / Servant Leadership
- Our Manual tells us “Actively inviting others to join is as important as the service rendered to the needy.” (Manual 2.1). New members are essential for Conference vitality and developing leadership capabilities for Conference sustainability.
- The St. Louis Council has some Conferences with dozens of members. These are spirit-filled, well-run, vibrant Conferences that serve many, many Neighbors in a myriad of creative ways.
- Employing creativity and a generous spirit, there will always be ways to utilize new Vincentians. Grow your services or works as you add new Vincentians.
- If a recruiting lead and team has not been formed yet – do so now. This team should develop a concrete plan to increase membership within a specified period.
- See “Invitation-to-Serve-for-New-and-Existing-Conferences” and “Increasing-Membership-Presentation”

Fundraising
- Increase donations to sustaining levels - what can your Conference do to increase regular giving? See document “Conference Fundraising Plan.”
Ensure regular contact and communication with clergy, parishioners, Mass attendees, other parish organizations, and local businesses (especially those listed in the bulletin).

**Phase V – Best Practice Implementation (approximate duration: 6 months)**

Implement Best Practices. Your Conference should now be spiritually vital, well-operating, with flourishing friendships, and serving your Neighbors in new and better ways. Now is the time to look at the bigger picture and contribute in enhanced or new ways.

- Refer to the “Questions About Recommended Best Practices” section of the Standards of Excellence Questionnaire for Conferences

- Choose one or more of the Best Practices to implement. They don’t have to be grand in nature. They’re your Conferences chance to shine and make the world an even better place!

See the Supporting Documentation list in the Conference Merger Resources section